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RESULTS

Atlas Van Lines 19th Annual Survey of Corporate Moving Practices

Atlas® Van Lines

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According to the 19th Annual Survey . . .

Early in 1986, Atlas Van Lines extensively analyzed major trends in corporate relocation. The annual Survey of Corporate Moving Practices, first conducted in 1968, has come to be eagerly awaited and referred to by the major segments of the relocation industry in particular and by the transportation industry in general.

The 19th Survey focused on three areas: Part One — Individual and Corporate Profile; Part Two — Corporate Moving Policies; and Part Three — Transportation and the Regulatory Environment.

This year's relocation executives who responded to the Survey represented major United States corporations from five broad segments of the national economy. In addition to the Fortune 1,000 industrial companies, the 65 questions were also sent to the 1,000 largest companies (based on sales) in retailing, insurance, banking, and transportation.

Most of the companies had 1985 sales of more than $100 million (76 percent), with the biggest percentage employing 100-499 salaried people (22 percent).

Unlike the 1985 Survey, which indicated that about half of the companies (49 percent) had traffic or transportation departments administering their corporate moving policies, this year's analysis revealed that more than half of the companies (54 percent) handled their own corporate relocations in the personnel or human resources area. That figure reflects the numbers from the 1984 Survey — that year, 64 percent of the respondents worked in personnel or human resources.

Although the percentage was smaller this year, once again, most of the respondents were in the manager category (39 percent). The majority of those people (53 percent) have been involved with employee relocations for 2-10 years, about the same number as last year (56 percent).

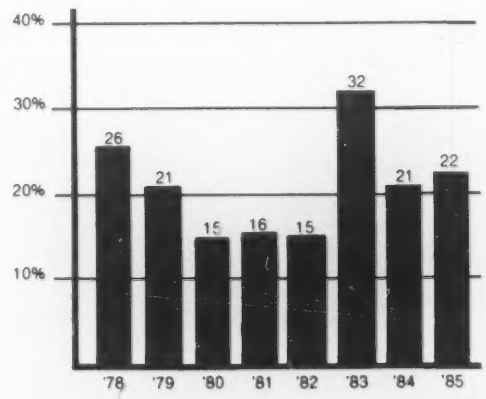
A high percentage this year was male (62 percent), but that's lower than both last year (73 percent) and the year before that (65 percent). Most of the companies arranged fewer than ten relocations in 1985 — for interstate moves, the figure was 36 percent (versus 37 percent last year); for intrastate, the figure was 58 percent (versus 64 percent).

As in 1985, most of the companies (66 percent) handled their relocations from a centralized transportation department, not from regional offices. In the companies without a centralized department, more than half (55 percent) make the carrier selection without consulting the employee. Only one in five of those non-centralized companies (19 percent) allows the employee alone to make the selection, and the same number works with the relocating employee to make the choice. The use of a relocation firm is becoming more common, but the figure is still low (6 percent versus 3 percent last year).

Most of the companies in this year's Survey are national (30 percent versus 28 percent), but there were marked differences in terms of companies that are regional (37 percent this year versus 9 percent in 1985) and that are international (34 percent versus 64 percent). Whatever the geographical scope, once again they were multidivisional (67 percent versus 65 percent) and publicly owned (67 percent versus 61 percent).

Projected changes in the number of employees the companies anticipate moving during 1986 echo last year's figures — 22 percent of the companies expect to increase the number of employees they would move this year versus last year. That degree of expected increase is in line with the average of the last seven years (21 percent), although the unusually optimistic figure of two years ago (32 percent in the 1984 Survey) remains well above that average.

Percentage of companies anticipating moving more employees during 1986 then were moved in 1985.



Just as last year, the averge, relocating salaried employee can reasonably expect to be moved less

frequently than every five years (70 percent of the responses indicated that), with the next most likely category every third year (11 percent versus 14 percent).

And for 93 percent of the companies (90 percent in 1985), those relocating employees represent less than 11 percent of the salaried work force. Women are still less likely to be transferred — in 1985, 25 percent of the companies had no female relocations (versus 32 percent the prior year). And less than 5 percent of the transferred employees of an additional 52 percent of the companies were women (versus 41 percent in 1985).

All of those figures are in the context of this 1985-versus-1984 comparison: 36 percent of the respondents indicated they had more transfers in 1985; 19 percent had fewer, and 45 percent had about the same number. But that first figure — 36 percent — is significantly down from last year's 49 percent.

A new question in 1985 determined that 75 percent of the most frequently transferred salaried employees are 31-40 years old, and this year's number was 73 percent. Further, most transferred employees are salespeople (47 percent) followed by plant and facility managers (18 percent).

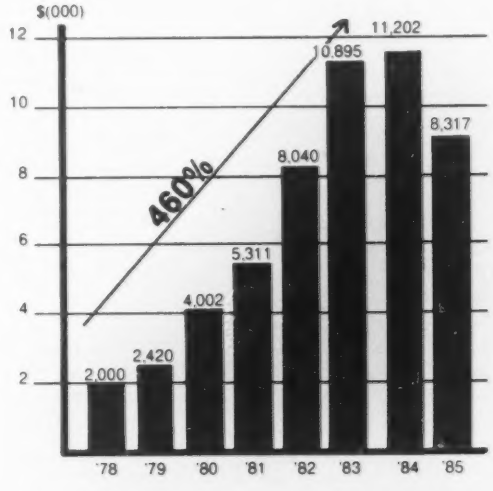
Once again, the most frequently relocated employee earns $31,000-$40,000 (42 percent versus 49 percent); 19 percent are between $26,000 and $30,000 (versus 23 percent), with 25 percent in the $40,000-plus range (versus 21 percent last year).

Reflecting a steady but pronounced economic rebound, 31 percent of the companies indicated that economic conditions had an external impact on the changing numbers of employee transfers. Looking back, especially to a time when the economy was much less healthy, the figure was 95 percent in 1981. It fell to 78 percent in 1982. Last year's figure was the same as this year's — 31 percent. The correlation between a strong national economy and increased, future corporate relocations seems clear.

Also continuing to positively affect the activity of moving the household goods of transferred employees were internal company conditions — factors like promotions (36 percent of the companies cited that factor), corporate reorganization (32 percent), expansion into new territories (22 percent), and activity involving acquisitions and mergers (17 percent).

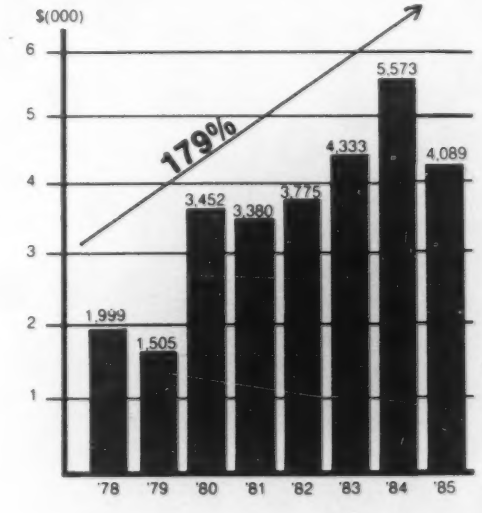
Dramatically, for the first time since 1978, costs for domestic moves actually fell. The average for moving "extras" — relocation services, hotel accommodations, family transportation, meals, house-hunting trips, and so on — was $8,317. That's a 26 percent drop from 1985 ($11,202) and the first decline after seven consecutive increases that measured 460 percent of the 1978 figure of $2,000.

Cost for moving "extras."



The average, direct van line packing and transportation services cost also fell — it was $4,089, down 27 percent from last year's $5,573. Although the change in this category from 1978 to 1984 (179 percent) was less steep and consistent than the "extras" figure, this year's drop is also significant.

Average cost of direct van line packing and transportation services.



Clearly, in 1985, it was less costly to purchase relocation services, whether moving "extras" or direct services. Although the reduced dollar amounts are surprising at a first reading, they are not at all unexpected in the context of lower inflation and the deep discounting that gathered so much steam in 1985.

Trends still echo an increasing concern for the transferee's future needs in his new location and for the needs of his family. Just as last year's results showed, full reimbursement of moving expenses is provided by 85 percent of the responding companies, and 63 percent allow more than one expense-paid house-hunting trip (versus 64 percent last year).

At the same time, 82 percent (versus 88 percent) of the companies allowed three or more days for each trip. Spouses continue to be paid to go along — 95 percent of the companies cover at least one trip.

And an employee's relocation continues to be affected by the employment status of that employee's spouse — the relocation is "almost always or frequently" affected 24 percent of the time. Similarly, when the spouse is employed full-time with another company, in nearly half of the cases, that situation increased the relocation complications of the transferee's company.

Companies are even more inclined to purchase the residence of a relocating employee if a buyer can't be found within a reasonable time. Perhaps because the cost of financing has become much more reasonable, 46 percent of the companies, in 1985, would actually purchase the former residence (versus 39 percent in 1984).

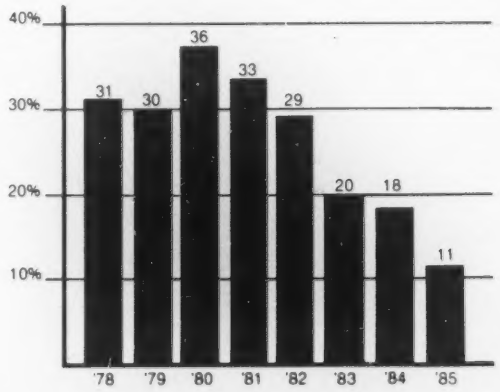
The most common method of calculating the purchase price is to pay the average of several appraisals (70 percent of the responding companies versus 58 percent). Making an arrangement with a national realtor, at least last year, was not very common (12 percent of the companies did that).

Other significant benefits are also increasingly being offered to relocating employees — benefits like paying a lease-termination penalty (69 percent of the responding companies versus 56 percent), paying all of the fees connected with the purchase or sale of a residence (62 percent versus 53 percent), assisting with a mortgage or swing loan (53 percent versus 41 percent), offering a mortgage-interest differential (51 percent versus 52 percent), and paying a cash bonus (34 percent versus 31 percent).

In 1984, at least one employee at 69 percent of the companies declined the opportunity to relocate — the figure last year was higher yet: 71 percent. That figure has remained fairly steady during the last decade, but those employees who refused a transfer represent less than 2 percent of their companies' work force in the vast majority of cases (77 percent of the companies).

Since 1980, fewer employees are turning down a relocation. That year, 36 percent of the reporting companies indicated that refusals to relocate increased from the previous year. In 1981, the figure fell to 33 percent; in 1982, 29 percent; in 1983, 20 percent. The 1984 figure fell further, to 18 percent. Last year, it fell again — to 11 percent. Perhaps a related factor is this: 37 percent of the respondents pointed out that declining the opportunity to relocate hindered an employee's career, a figure only a little below the 42 percent high of the last several years.

Percentage increases of refusals to relocate versus the previous year.



The reasons for declining a move are these: the lack of a desire to move (36 percent of the reporting companies indicated that reason), family ties (32 percent), cost of living in the new location (27 percent), spouse's employment (24 percent), and concerns about housing and mortgage financing (20 percent).

Deregulation — or "reregulation," as it's sometimes called — was ushered in with the passage of the Household Goods Transportation Act of 1980. And since that time, two ways of doing business continue to be selected as the most beneficial by-products of deregulatory legislation — volume discounts (43 percent of the companies) and contracts (19 percent).

The 1986 Survey indicated that 70 percent of the companies had contractual agreements with more than one carrier, up from 59 percent the year before. That situation reflects, in part, the continuing strong market position of the corporate buyer (the shipper) versus the seller (the carrier). Most companies (95 percent) rated their contract carriage arrangements as "excellent or good."

The main guideline to evaluate a carrier was once again dependable and flexible service — 81 percent of the companies ranked that factor as the most important (versus last year's 70 percent). Price was a more distant second (44 percent of the companies felt it was the second most important evaluation guideline). That service/price trade-off reflects the ongoing tug-of-war between what the carrier wants to stress — service — and what the shipper often turns to — price. Claims and employee feedback were of secondary importance.

Service was also once again the primary factor companies used to select a carrier — 83 percent, up from 74 percent last year. Price was second, followed about equally by claims and reputation.

For the second year, there were Survey questions about insurance coverage of transported goods. Half of the companies use full replacement value protection, an increase from last year's 42 percent. Down from 34 percent was the figure for transporting at a released rate of 60¢ per pound, per article (24 percent). The remainder of the companies (27 percent) use declared value protection, which is based on depreciation.

Of the companies using declared value protection, 78 percent felt the appropriate dollar-per-pound valuation should be less than $4.00. Those companies not arranging for full replacement value are reluctant to do so (24 percent of the companies plan to make that change), but are less reluctant than last year (16 percent).

For companies using replacement value protection, 74 percent arrange for coverage from the van line, up from 65 percent, while almost equal numbers secure insurance from an insurance carrier (38 percent) or are self-insured under an in-house risk management program (35 percent).

Repeating a question introduced last year, the Survey measured the effects of deregulation on the airline, general commodity trucking, household goods moving, communications, and finance industries. In general, deregulation has continued to benefit users, but the positive effects for providers fell off markedly. On average, 67 percent of the responses indicated the industries were "worse for all or some providers" (versus 33 percent last year).

Other important Survey findings include the following:

1. Although companies tended to demonstrate little difference in terms of allowing more benefits for new hires versus transferees, the emphasis was on the side of transferees (54 percent).
2. A new question determined that less than 5 percent of a company's transferred employees leave after being transferred (89 percent of the companies indicated that).
3. The summer months of June through September continue to be the busiest period (63 percent of the companies), with April and May the second busiest (18 percent).
4. Another new question asked if companies would consider "one-stop shopping" as a means of securing all of the needed relocation services — real estate services, transportation services, counseling services, and so on. The answer was a definite "no" — 74 percent of the respondents were not interested in obtaining those services through a single source.
5. Up from 21 percent last year, 34 percent of the companies use a relocation service — and companies with less than ten yearly interstate moves were the most frequent users of such a service.
6. Moving "extras" averaged $8,317 — for regional companies, the figure was $7,172; national, $7,489; international, $12,592.
7. Direct van line costs averaged $4,089 — for regional companies, the figure was $3,669; national, $4,668; international, $4,512.
8. The ages of transferees revealed that 95 percent were between 25 and 45 years of age.

The 19th Survey is available at no charge from Atlas' Public Information Department. Findings from this year's questionnaire will help the major household goods carriers more efficiently meet their corporate customers' increasingly complex needs. As a direct result, both shippers and carriers benefit, and the moving industry in general is also a major beneficiary.

ATLAS VAN LINES, INC.

19th Annual Survey
of
Corporate Moving Practices

NOTE: For the following questions--8, 21-24, 26, 30, 41, 48, 60-61--percentage totals may exceed 100 because the Survey asked for more than one response to each question. Also, because percentages have been rounded up, some totals in the other questions may not exactly equal 100.

PART ONE -- Individual and Corporate Profile

1. Which one of the following categories best represents the focus of your department?

   (a) Personnel/Human Resources 54%
   (b) Traffic/Transportation 16%
   (c) Administration 11%
   (d) Purchasing 4%
   (e) Industrial Relations 1%
   (f) Special Services 0.4%
   (g) Real Estate 1%
   (h) Finance 3%
   (i) Personnel/Compensation and Benefits 7%
   (j) Law 0%
   (k) Marketing 1%
   (l) Other 1%

2. Which one of the following categories best describes your position within the company?

   (a) President 4%
   (b) Vice-President 17%
   (c) Assistant Vice-President 4%
   (d) Manager 39%
   (e) Director 7%
   (f) Owner 1%
   (g) Major Stockholder 0%
   (h) Other 30%

3. How long have you been involved with employee relocation?

   (a) Less than 2 years 23%
   (b) 2-5 years 31%
   (c) 6-10 years 27%
   (d) 11-15 years 12%
   (e) 16-20 years 5%
   (f) More than 20 years 7%

4. Are you . . .

   (a) Male? 62%
   (b) Female? 38%

5. Approximately how many interstate employee relocations was your department responsible for in 1985?

   (a) 0-9 36%
   (b) 10-19 13%
   (c) 20-49 15%
   (d) 50-99 13%
   (e) 100-199 12%
   (f) 200-299 6%
   (g) More than 300 7%

6. Approximately how many intrastate employee relocations was your department responsible for in 1985?

(a) 0-9 58%
(b) 10-19 14%
(c) 20-49 14%
(d) 50-99 7%
(e) 100-199 4%
(f) 200-299 2%
(g) More than 300 1%

7. Does your company have a centralized transportation department--that is, from the main corporate office versus regionally?

(a) Yes 66%
(b) No 34%

8. If you answered "Yes" to question 7, does your company's centralized transportation department (circle appropriate response to each question) . . .

(a) Yes Control air carrier selection? 55%
(b) Yes Control freight carrier selection? 74%
(c) Yes Control household goods carrier selection? 81%
(d) Yes Handle office relocations? 57%
(e) Yes Recommend site and space selection for office relocations? 32%
(f) Yes Handle air travel via commercial airline? 41%
(g) Yes Handle air travel via corporate aircraft? 20%
(h) Yes Handle ground transportation via corporate vehicles? 46%

9. If you answered "No" to question 7, who selects the carrier that is responsible for your employee's move?

(a) The company 55%
(b) The employee 19%
(c) The company and the employee in combination 20%
(d) A relocation firm 6%
(e) Other 2%

10. Which one of the following classifications most accurately describes your company?

(a) Manufacturing 33%
(b) Service (includes government, education, health care, etc.) 40%
(c) Financial 27%

11. Is your company . . .

(a) Multidivisional? 67%
(b) Centralized? 33%

12. Is your company . . .

(a) Regional? 37%
(b) National? 30%
(c) International? 34%

13. Is your company . . .

(a) Publicly owned? 67%
(b) Privately owned? 34%

14. Your company's approximate annual sales for 1985 were . . .

(a) Less than $10 million 8%
(b) $10-$49 million 7%
(c) $50-$99 million 9%
(d) $100-$499 million 24%
(e) More than $500 million 51%

15. How many salaried (that is, non-hourly) people are employed by your company?

(a) Less than 100 9%
(b) 100-499 22%
(c) 500-999 15%
(d) 1,000-1,999 15%
(e) 2,000-2,999 9%
(f) 3,000-5,000 12%
(g) More than 5,000 18%

16. What percentage of those salaried employees did your company move or relocate during 1985?

(a) Less than 5% 73%
(b) 5%-10% 21%
(c) 11%-15% 3%
(d) 16%-20% 2%
(e) More than 20% 2%

17. Which one of the following categories most accurately describes the frequency with which an average salaried employee of your company can reasonably expect to be moved?

(a) Every year or more often 0.4%
(b) Every second year 7%
(c) Every third year 11%
(d) Every fourth year 5%
(e) Every fifth year 6%
(f) Less frequently than once every five years 70%

18. In 1985, how many of your transferred employees were women?

(a) None 25%
(b) Less than 5% 52%
(c) 5%-10% 10%
(d) More than 10% 12%

19. Do you anticipate that the number of employees your company will move during 1986 will . . .

(a) Increase from the number moved in 1985? 22%
(b) Decrease? 27%
(c) Remain about the same? 51%

20. Comparing the number of employee transfers in 1985 with 1984, the 1985 number . . .

(a) Increased greatly versus 1984 9%
(b) Increased moderately versus 1984 27%
(c) Decreased greatly versus 1984 6%
(d) Decreased moderately versus 1984 13%
(e) Remained about the same 45%

21. If the number of employee transfers changed from 1984 to 1985, what external conditions had the most significant impact on that number? Check each applicable response.

(a) Economic conditions 31%
(b) Energy 2%
(c) Political conditions 1%
(d) Growth of industry 24%
(e) Lack of qualified people locally 13%
(f) Other 17%

22. What internal company conditions affected the change in the number of employee transfers? Check each applicable response.

(a) Increased production 7%
(b) Decreased production 7%
(c) Expansion of facility 13%
(d) Closing of facility 21%
(e) Expansion into new territories 22%
(f) Budget constraints 12%
(g) Acquisitions/mergers 17%
(h) Corporate reorganization 32%
(i) Promotions/resignations 36%
(j) Other 8%

PART TWO--Corporate Moving Policies

23. How has your corporate moving policy changed during the last two years? Check each applicable response.

(a) Increased housing assistance with housing problems 16%
(b) Improved insurance programs 11%
(c) Exceptions to the policy are made if individual circumstances so warrant 29%
(d) Expanded benefits other than housing assistance 13%
(e) Has not changed 53%
(f) Decreased benefits 6%

24. How is information about your company's employee transfer policy made known to your employees?

(a) Employee is provided a detailed handbook or brochure describing all procedures and conditions 11%
(b) Employee is provided printed material describing company policies, and this information is also explained by authorized personnel within the company 58%
(c) Pre-move counseling is provided within the company 17%
(d) There is no set policy--each case is handled individually and explained on a one-to-one basis 24%
(e) Professional counseling is provided by a relocation firm 5%

25. How does your company handle moving expense reimbursement?

(a) Full reimbursement of moving expenses 85%
(b) Partial reimbursement based on salary, position, tenure, etc. 13%
(c) No reimbursement of moving expenses 2%

26. Besides the packing and transportation of household goods, does your company allow the relocating employee (circle appropriate response to each question) . . .

(a) Yes To move an automobile at company expense? 79%
(b) Yes To move a second automobile at company expense? 50%
(c) Yes To move a boat at company expense? 27%
(d) Yes To have belongings picked up from a secondary residence (summer home, relative's home, etc.)? 37%
(e) Yes To hire temporary maid service at either the old or the new residence? 9%
(f) Yes To move unlimited weight? 66%
(g) Yes Permanent storage of some possessions? 15%
(h) Yes To move collections of highly valuable objects like statuary, paintings, and antiques? 63%
(i) Yes To move pets? 41%
(j) Yes To move recreation and lawn equipment? 80%

27. How many expense-paid trips does your company allow an employee in order to find housing in the new location?

(a) None 5%
(b) One 32%
(c) Two 56%
(d) Three 4%
(e) More than three 3%

28. What is the average number of days allowed for a house-hunting trip?

(a) 1-2 18%
(b) 3-4 44%
(c) 5-6 27%
(d) More than 6 11%

29. How many expense-paid, house-hunting trips does your company allow the spouse to accompany your employee?

(a) None 5%
(b) One 39%
(c) Two 51%
(d) Three 3%
(e) More than three 2%

30. With regard to buying or selling an employee's home, does your company or its authorized representative (circle appropriate response to each question) . . .

(a) Yes Pay none of the selling costs? 21%
(b) Yes Pay only the real estate commission? 13%
(c) Yes Pay all of the fees connected with the purchase or sale of the house (lawyer, title, land surveys, etc.)? 62%
(d) Yes Guarantee a sale price for the employee's former residence? 31%
(e) Yes Actually purchase the employee's former residence? 46%
(f) Yes Pay a lease-termination penalty? 69%
(g) Yes Assist in the sale of a vacation home? 1%
(h) Yes Offer no assistance in the new location? 19%
(i) Yes Assist with the arrangement of a mortgage or swing loan? 53%
(j) Yes Pay a cash bonus? 34%
(k) Yes Offer a mortgage-interest differential? 51%
(l) Yes Offer a cost-of-living differential? 24%

31. If your company will buy an employee's former residence--if no other buyer can be found within a reasonable time--how do you determine the sale price?

(a) Pay the employee's asking price 0%
(b) Pay the employee the appraised value 17%
(c) Negotiate with the employee 2%
(d) Pay the average of several appraisals 70%
(e) Arrange with a national realtor to act on behalf of the company and the employee 12%

32. Does your company's moving policy allow more benefits for new hires or for transferees?

(a) New hires 4%
(b) Transferees 54%
(c) No difference 42%

33. During 1985, what was the average cost per domestic move to your company for such "moving extras" as relocation firms; motel accommodations; family transportation; meals; maid service; pre-move, house-hunting trips; appliance servicing, and similar items? Exclude any salary increases, the cost of van line services, housing compensation, and financial assistance to employees disposing of former residences.

$ 8,317

34. During 1985, what was the average cost per domestic move to your company for direct van line packing and transportation services? Exclude "moving extras" as described in question 33.

$ 4,089

35. The total moving cost — the "extras" of question 33 and the direct van line packing and transportation services of question 34 — is what percentage of your company's total cost of relocating an employee?

(a) Less than 10% 19%
(b) 11%-20% 11%
(c) 21%-30% 15%
(d) 31%-40% 9%
(e) 41%-50% 11%
(f) More than 50% 20%

36. Has that percentage increased or decreased during the past five years?

(a) Increased 36%
(b) Decreased 5%
(c) Stayed about the same 59%

37. If your company arranges for the movement of household goods in connection with employee relocations, does it transport the goods . . .

(a) At a released rate of 60¢ per pound, per article? 24%
(b) With declared value protection (depreciation value)? 27%
(c) With full replacement value protection? 50%

38. If your company ships at a released rate (60¢ per pound, per article), is your company . . .

(a) Self-insured at full replacement cost? 51%
(b) Self-insured at a declared value protection? 15%
(c) Instructing the carrier to settle as fully insured and charging the difference to your insurer? 11%
(d) Instructing the carrier to settle at a released rate and having the relocating employee submit a second claim to your insurer for the difference? 24%

39. If your company uses the declared value protection, what do you feel is the appropriate dollar-per-pound valuation?

(a) Less than $3.00 45%
(b) $3.00-$3.99 33%
(c) $4.00-$4.99 15%
(d) $5.00-$5.99 6%
(e) More than $6.00 1%

40. If your company does not currently arrange for full replacement value protection, are you planning to make that change?

(a) Yes 24%
(b) No 76%

41. If your company uses replacement value protection (circle appropriate response to each question) . . .

(a) Yes Is your company self-insured under an in-house risk management program? 35%
(b) Yes Does your company arrange coverage from the van line? 74%
(c) Yes Does your company secure insurance from an insurance carrier or carriers? 38%

42. How frequently is an employee's relocation affected by the employment status of that employee's spouse?

(a) Almost always 4%
(b) Frequently 20%
(c) Seldom 58%
(d) Never 18%

43. If a relocating employee's spouse is employed full-time with another company, does that situation . . .

(a) Increase your company's relocation complications? 45%
(b) Decrease the complications? 1%
(c) Cause the complications to remain about the same? 54%

44. How does your company assist, if at all, an employee's spouse in finding employment in the new location?

(a) No assistance 73%
(b) Pay job-finder's fee 9%
(c) Find employment within the company 6%
(d) Find employment outside the company 13%
(e) Pay spouse's full or partial salary until hired 1%

45. Did at least one of your employees decline the opportunity to relocate during 1985?

(a) Yes 71%
(b) No 29%

46. If you answered "Yes" to question 45, how many employees--as a percentage of your company's work force--who were offered transfers declined the opportunity to relocate during 1985?

(a) Less than 2% 77%
(b) 2%-4% 17%
(c) 5%-7% 2%
(d) 8%-10% 1%
(e) More than 10% 4%

47. If you answered "Yes" to question 45, did the number of employees declining relocation during 1985 . . .

(a) Increase from the 1984 level? 11%
(b) Decrease? 6%
(c) Remain about the same? 83%

48. What reasons did employees give for declining relocation?

(a) Cost of living in the new location 27%
(b) Family ties 32%
(c) Housing/mortgage concerns 20%
(d) Spouse's employment 24%
(e) No desire to move 36%
(f) Climate 5%
(g) Other 8%

49. Does declining the opportunity to relocate usually hinder an employee's career?

(a) Yes 37%
(b) No 63%

50. What percentage of your company's transferred employees leave after being transferred?

(a) Less than 5% 89%
(b) 6%-10% 6%
(c) 11%-25% 3%
(d) 26%-50% 2%
(e) More than 50% 0%

51. During which one of the following periods of the year did your company make most of its moves?

(a) January-March 12%
(b) April-May 18%
(c) June-September 63%
(d) October-December 8%

52. What is the average age of your company's most frequently transferred salaried employees?

(a) Less than 25 years 3%
(b) 25-30 years 13%
(c) 31-35 years 46%
(d) 36-40 years 27%
(e) 41-45 years 8%
(f) More than 45 years 2%

53. Which one of the following categories of your company's work force is most likely to experience the greatest number of relocations?

(a) Sales 47%
(b) Plant/facility management 18%
(c) Engineering 10%
(d) Data processing 3%
(e) Administration 11%
(f) Research and development 1%
(g) Finance 5%
(h) Marketing 7%

54. Does your company have contractual agreements for the transportation of . . .

(a) Products? 11%
(b) Exhibits? 7%
(c) Employee relocations? 60%

55. What is the salary range of your company's most frequently transferred salaried employees?

(a) Less than $15,000 1%
(b) $15,000-$20,000 3%
(c) $21,000-$25,000 9%
(d) $26,000-$30,000 19%
(e) $31,000-$40,000 42%
(f) More than $40,000 25%

PART THREE -- Transportation and the Regulatory Environment

56. Since the passage of the Household Goods Transportation Act of 1980, which one of the following programs or services has been the most beneficial to your company?

(a) Guaranteed price 19
(b) Replacement value protection 10%
(c) Volume discounts 43%
(d) Contracts 19%
(e) Guaranteed pickup and delivery 9%

57. With how many carriers does your company have contractual agreements for the transportation of household goods . . .

(a) One carrier? 30%
(b) Two carriers? 26%
(c) Three carriers? 21%
(d) Four or more carriers? 24%

58. If your company entered into a contract carriage agreement during 1985, what was the primary reason?

(a) Cost 60%
(b) Service 29%
(c) Reliability 12%

59. In terms of evaluation, what has been your company's experience with such contract carriage arrangements?

(a) Excellent 51%
(b) Good 44%
(c) Fair 5%
(d) Poor 0%

60. Does your company use the services of a relocation service or a brokerage firm? Check each applicable response.

(a) Relocation service 34%
(b) Brokerage firm 4%
(c) Relocation and brokerage services not used 42%

61. If you used a relocation service or a brokerage firm in 1985, which services did it provide? Check each applicable response.

(a) Counseling about the planning and details of moving 10%
(b) Counseling about company policy 6%
(c) Real estate sale and purchase 33%
(d) Orientation tours in the new location 13%
(e) Arrangement of family's transportation and accommodations 2%
(f) Contact of household goods moving company 5%
(g) Audit and/or payment of invoice 3%
(h) Monitoring of shipment 4%
(i) Assistance with employee claims preparation and submission 4%
(j) Supplementary services (appliances, cleaning, etc.) 1%

62 Would your company consider "one-stop shopping"as a means of securing all of the needed relocation services? That is, would you obtain — through a single source — real estate services, transportation services, counseling services, and so on?

(a) Yes 26%
(b) No 74%

63. Rank the following guidelines in terms of carrier evaluation ("1" = the most important).

(a) 1 Service (dependability, flexibility)
(b) 4 Employee feedback
(c) 3 Claims
(d) 2 Price

64. Rank the following guidelines in terms of carrier selection ("1" = the most important).

(a) 1 Service (past performance of carrier or carrier's agent)
(b) 2 Price
(c) 3 Claims
(d) 4 Reputation

65. Based on your experience, how would you classify the effects of deregulation (or "reregulation," as some observers describe it) on the following industries, in terms of user and provider. Check one response for user effects and one response for provider effects for each industry.

(a) Airline industry
(1) Better for all users 33%
(2) Better for some users 60%
(3) Worse for all users 3%
(4) Worse for some users 5%
(5) Better for all providers 27%
(6) Better for some providers 12%
(7) Worse for all providers 49%
(8) Worse for some providers 11%

(b) General commodity trucking industry
(1) Better for all users 32%
(2) Better for some users 62%
(3) Worse for all users 0%
(4) Worse for some users 6%
(5) Better for all providers 28%
(6) Better for some providers 11%
(7) Worse for all providers 52%
(8) Worse for some providers 9%

(c) Household goods moving industry
(1) Better for all users 36%
(2) Better for some users 57%
(3) Worse for all users 1%
(4) Worse for some users 6%
(5) Better for all providers 25%
(6) Better for some providers 10%
(7) Worse for all providers 54%
(8) Worse for some providers 11%

(d) Communications industry
(1) Better for all users 22%
(2) Better for some users 41%
(3) Worse for all users 23%
(4) Worse for some users 13%
(5) Better for all providers 22%
(6) Better for some providers 6%
(7) Worse for all providers 56%
(8) Worse for some providers 16%

(e) Finance industry
(1) Better for all users 30%
(2) Better for some users 56%
(3) Worse for all users 3%
(4) Worse for some users 11%
(5) Better for all providers 21%
(6) Better for some providers 5%
(7) Worse for all providers 57%
(8) Worse for some providers 17%

On behalf of Atlas Van Lines and the entire household goods moving industry, we wish to thank the corporate executives who took the time and effort necessary to complete this questionnaire. Their participation in helping us develop this unique and valuable guideline will contribute greatly to continued improvement in household goods moving services.

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